



Association of Bay Area Governments

☐ San Joaquin Council of Governments

☐ Stanislaus Council of Governments

Demographic & Employment Forecasts

*Population, Residential and Job Growth in the IRP Region
of Alameda, Contra Costa, San Joaquin, Santa Clara and Stanislaus Counties*

A c k n o w l e d g e m e n t s

Inter-Regional Partnership Members

Dan Bilbrey, Mayor
City of Tracy (Co-Chair)

Mark DeSaulnier, Supervisor
Contra Costa County (Co-Chair)

Lorraine Dietrich, Vice Mayor
City of Livermore

Richard Dodds, Mayor
City of Patterson

Millie Greenberg, Council Member
Town of Danville

Jeff Grover, Supervisor
Stanislaus County

Scott Haggerty, Supervisor
Alameda County

Denny Jackman, Council Member
City of Modesto

Linda LeZotte, Council Member
City of San Jose

Pete McHugh, Supervisor
Santa Clara County

Gloryanna Rhodes, Mayor
City of Lathrop

Jack Sieglock, Supervisor
San Joaquin County

Brian Swisher, Mayor
City of Brentwood

Bob Wasserman, Council Member
City of Fremont

Inter-Regional Partnership Staff

Association of Bay Area Governments
Gerald Raycraft, Planning Director

Alex Amoroso, Principal Planner

Christy Riviere, Regional Planner

Michael Smith, Regional Planner

San Joaquin Council of Governments
Julia E. Greene, Executive Director

Michael Swearingen, Senior Regional Planner

William Ridder, Regional Planner

Stanislaus Council of Governments
Gary Dickson, Executive Director

Lark Downs, Senior Regional Planner

T a b l e o f C o n t e n t s

Introduction	1	Tables	Santa Clara County
IRP Region	2	IRP Region	Total Jobs, Population, Households
Population Growth	2	Population	30
Residential Growth	3	Households	31
Job Growth	4	Jobs	32
Jobs/Housing Balance	5	Housing Surpluses and Shortfalls	34
Alameda County	6		Total Population by Jurisdiction
Population & Residential Growth	6		35
Job Growth	6		Total Households by Jurisdiction
Jobs/Housing Balance	8		36
Contra Costa County	14	Alameda County	Stanislaus County
Population & Residential Growth	14	Total Jobs, Population, Households	38
Job Growth	15	Housing Surpluses and Shortfalls	39
Jobs/Housing Balance	16	Jobs/Housing Balance	40
San Joaquin County	22	Total Population by Jurisdiction	41
Population & Residential Growth	22	Total Households by Jurisdiction	42
Job Growth	23	Total Jobs by Jurisdiction	43
Jobs/Housing Balance	24		
Santa Clara County	29	Contra Costa County	
Population & Residential Growth	29	Total Jobs, Population, Households	15
Job Growth	29	Housing Surpluses and Shortfalls	16
Jobs/Housing Balance	31	Jobs/Housing Balance	17
Stanislaus County	37	Total Population by Jurisdiction	19
Population & Residential Growth	37	Total Households by Jurisdiction	20
Job Growth	38	Total Jobs by Jurisdiction	21
Jobs/Housing Balance	39	San Joaquin County	
		Total Jobs, Population, Households	23
		Housing Surpluses and Shortfalls	24
		Jobs/Housing Balance	25
		Total Population by Jurisdiction	26
		Total Households by Jurisdiction	27
		Total Jobs by Jurisdiction	28

This document examines the growth trends of the five counties that make up the San Francisco Bay Area - Central Valley Inter-Regional Partnership (IRP). The Inter-Regional Partner-

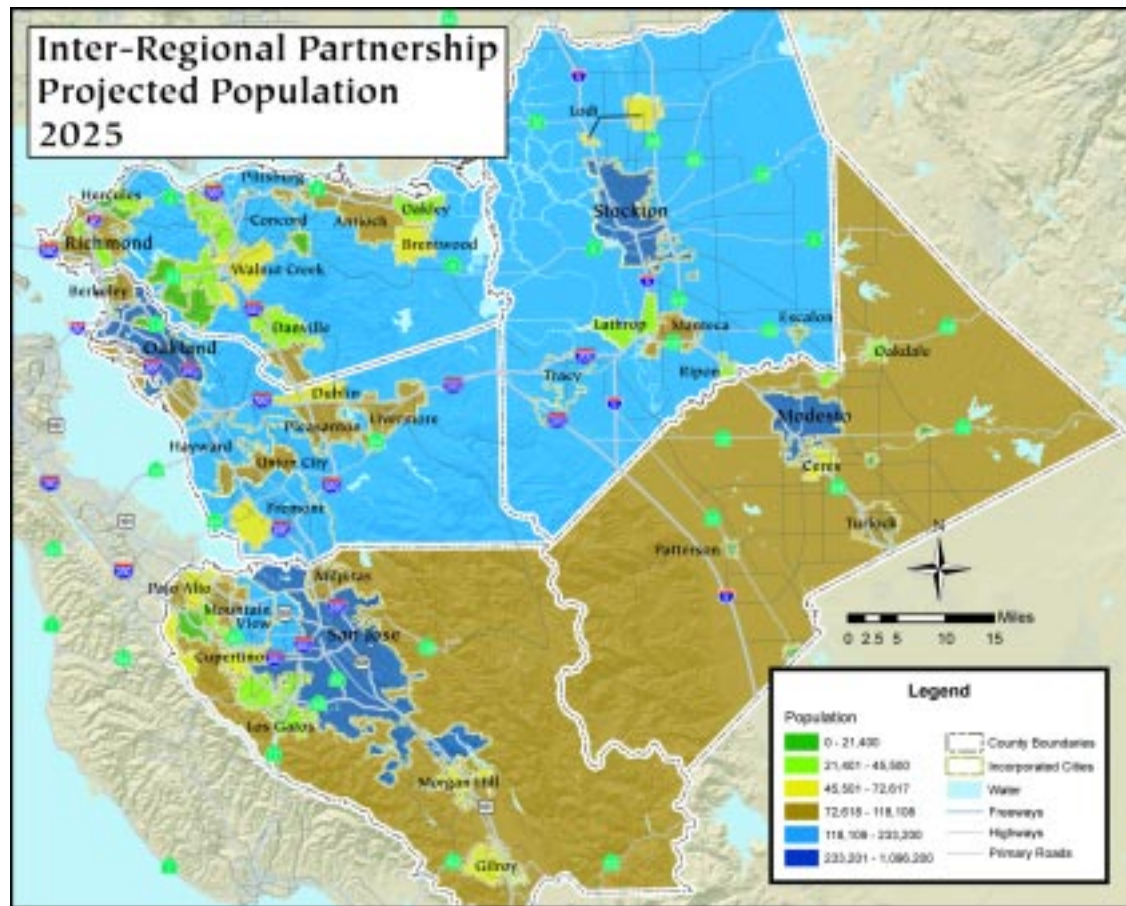
ship was formed in 1998 as a partnership between fifteen elected officials representing five counties - Alameda, Contra Costa, San Joaquin, Santa Clara, and Stanislaus. Through the IRP,

these local representatives work to bridge jurisdictional boundaries to forge cooperative solutions to shared problems. These problems include the geographic separation of housing and employment; mounting traffic and air pollution; and unbalanced growth. Three councils of governments (COGs)—the Association of Bay Area Governments, the San Joaquin Council of Governments, and the Stanislaus Council of Governments—provide staffing, financial support and regional expertise to the IRP.

In this document, population, housing and job growth trends through 2025 are summarized for the entire IRP region and the counties therein. The data for the counties and much of the text comes directly from the individual COGs, as each COG has developed a complete set of projections for their own use.

Jobs/housing balance relationships have been identified as one of the key issues for the IRP. Therefore, job growth and the relationship to housing has been detailed for the region and each county.

Graphs, charts and maps are provided as data synopses and to visually depict the anticipated growth over the next 25 years in this dynamic and diverse region.



Population Growth

Over the next 25 years the population of the five counties of the San Francisco Bay Area - Central Valley Inter-Regional Partnership, made up of Alameda, Contra Costa, San Joaquin, Santa Clara and Stanislaus counties, will grow by over 32 percent, to over 6.7 million people.

The Bay Area counties of Alameda, Contra Costa and Santa Clara will continue to be more populous than their rural neighboring

counties with a 2025 projected combined population of nearly 5 million people. Santa Clara County is projected to continue to be the most populous of the Bay Area IRP counties, with well over 2 million people by 2025. Contra Costa County, while the least populous of the Bay Area counties, will experience the greatest rate of growth at 28 percent from 2000 to 2025.

The Central Valley counties of Stanislaus and San Joaquin will continue to be significantly less urban than the Bay Area IRP counties. How-

ever, both counties are projected to experience tremendous rates of growth in the next 25 years. Stanislaus County's population is expected to grow by 85 percent over the next 25 years to over 826,00 residents. San Joaquin County's population will grow by 59 percent, from a current population of 566,600 to well over 900,000. By comparison, the Bay Area counties of the IRP will grow by only 22 percent over the same period.

POPULATION						
	2000	2005	2010	2015	2020	2025
Alameda	1,443,741	1,534,400	1,588,900	1,628,800	1,669,400	1,714,200
Contra Costa	948,816	1,013,200	1,074,500	1,128,800	1,179,500	1,209,900
San Joaquin	566,600	633,348	700,095	766,843	821,851	900,338
Santa Clara	1,682,585	1,788,300	1,879,700	1,949,500	2,007,500	2,064,200
Stanislaus	446,997	522,822	598,647	674,473	750,298	826,123
IRP Region	5,088,739	5,492,070	5,841,842	6,148,416	6,428,549	6,714,761

Residential Growth

The five counties that make up the IRP region will add over a half-million households for a total of over 2.3 million by 2025. This figure represents a 33 percent growth over current levels. Household growth is projected to be the strongest in the rural counties of San Joaquin and Stanislaus and be slower, yet steady, in the more urban Bay Area counties.

The Bay Area counties of Alameda, Contra Costa and Santa Clara combined, will

add a little over 317,000 housing units to current figures. Alameda County will see the slowest household growth. Alameda will add only a little over 88,000 units in the next 25 years or 17 percent over 2000 figures. Santa Clara County will add over 129,000 units, or 23 percent over current levels. Of the Bay Area counties in the IRP region, Contra Costa is projected to experience the highest rate of growth, 29 percent in the next couple of decades.

The Central Valley counties of Stanislaus and San Joaquin are projected to add a tremen-

dous amount of housing to their existing stock. Stanislaus County is expected to add over 150,000 units, or 91 percent over the next 25 years. San Joaquin County's households will grow by 57 percent, from the current 202,320 to well over 300,000 units.

HOUSEHOLDS						
	2000	2005	2010	2015	2020	2025
Alameda	523,366	543,400	562,010	578,540	595,540	611,680
Contra Costa	344,129	364,129	387,960	408,870	428,870	443,510
San Joaquin	202,320	225,185	248,094	270,994	293,903	316,768
Santa Clara	565,863	596,760	626,730	625,470	674,410	695,170
Stanislaus	145,146	175,379	205,612	235,846	266,079	296,312
IRP Region	1,780,824	1,905,634	2,030,406	2,146,720	2,258,662	2,363,440

Job Growth

With the dot-com bubble burst in 2000 and 2001, the IRP region, along with the rest of the nation entered into a recession. Although the near term job opportunities in the IRP counties will continue to be impacted by the effects of this recession, the long-term prospects of the Bay Area and Central Valley economies are positive.

By 2025, over 3.5 million jobs will be located in the five IRP counties, a 36 percent increase over current levels. In the next five to

ten years, however, job growth is projected to remain stable at 14.5 percent.

In the Bay Area counties of the IRP, growth in the number of jobs in the short term is expected to be limited. The long-term forecast, however, shows significant change. The Bay Area has an unusually high concentration of computer electronics, telecommunications, and computer software jobs. In addition, the Bay Area is one of the leading regions for biomedical research and development. Some of the nation's top universities and research institutes nurture and support these industries. A varied economy that

includes finance, tourism, and government completes the picture. (Source: *Projections 2002*, Association of Bay Area Governments)

The IRP's Central Valley counties are projected to add over 218,670 new jobs to their economy by 2025, 56 percent more than their current combined total jobs. San Joaquin County will add 81,898 new jobs for a total of 283,569 jobs by 2025. Stanislaus County projects over 73 percent growth in total jobs over the next couple of decades. Currently, Stanislaus County has well over 186,000 jobs, but expects to see over 323,000 jobs by 2025.

JOBS						
	2000	2005	2010	2015	2020	2025
Alameda	751,680	790,400	857,450	914,790	964,740	1,014,190
Contra Costa	361,110	385,050	419,140	445,140	470,480	495,460
San Joaquin	201,671	218,051	234,430	250,810	267,189	283,569
Santa Clara	1,092,330	1,130,860	1,216,200	1,288,800	1,341,430	1,395,830
Stanislaus	186,235	213,590	240,945	268,300	295,655	323,010
IRP Region	2,593,026	2,737,951	2,968,165	3,167,840	3,339,494	3,512,059

Jobs/Housing Balance

Jobs/housing balance is measured by the ratio of the number of jobs against the number of housing units. Ideally, there should be 1.5 jobs available per household (occupied housing unit) in any given community. A jurisdiction is said to have a jobs/housing “imbalance” when their jobs/housing ratio is greater than or less than 1.5. A community with more jobs than housing, will have a high jobs/housing balance, i.e. greater than 1.5. A community with more housing than jobs will have a jobs/housing ratio that is less than 1.5. This measure was developed by the California State Department of Housing and Community Development.

Not surprisingly, jobs and housing in the IRP region, as a whole, are relatively balanced. The current jobs/housing balance figure for the region is at 1.46. This ratio is only projected to increase by 2 percent to a near perfect 1.49 by 2025. This balance is quite deceptive. Although the region does have a jobs/housing balance, there is an inherent problem in how that balance is achieved.

The IRP region achieves its seemingly reassuring jobs/housing balance because there is so much imbalance in the individual counties that make up the region. The Bay Area counties of Santa Clara and Alameda each have significant housing shortfalls, where they are producing far

fewer homes than jobs. Santa Clara County has a jobs/housing ratio of 1.93. That figure is projected to increase to 2.01 by 2025. Santa Clara County’s jobs/housing ratios translate into over 235,000 housing units that in theory should be built in the county by 2025.

Like Santa Clara County, Alameda County will also see a significant housing shortfall by 2025. Over 64,440 housing units are needed to house all the new workers that are projected to come to the County for employment by 2025. Instead, Alameda will see its jobs/housing ratio increase from 1.43 to 1.66 by 2025, indicating that job development will outpace housing development in the next 25 years.

In contrast, the Central Valley counties of San Joaquin and Stanislaus and eastern Contra Costa County are producing a tremendous amount of housing. San Joaquin County alone will produce an excess of 127,700 housing units over what is needed to house its own workers. Stanislaus County will see a remarkable 285% increase in its current housing “surplus” of 20,990. By 2025, Stanislaus County will be producing over 80,790 housing units more than it needs to achieve a jobs/housing balance.

Housing production in San Joaquin, Stanislaus and eastern Contra Costa County offsets the job production in the inner Bay Area, creating a jobs/housing balanced region that is in reality highly unbalanced. In total, the outlying areas of the IRP region are producing over 321,700 housing units to essentially house inner Bay Area workers.

HOUSING SUPRLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000 -2025 Percent Change
Alameda	22,246	-64,446	-390 %
Contra Costa	103,389	113,203	10 %
San Joaquin	67,873	127,722	88 %
Santa Clara	-162,357	-235,383	46 %
Stanislaus	20,990	80,792	285 %
IRP Region	52,140	22,068	-58 %

Population & Residential Growth

Alameda County's population reached 1.44 million in 2000, making it the second most populous county in the IRP region behind Santa Clara County. Oakland is the most populous city in the county, with almost 400,000 residents.

Alameda County is unique in that it contains several urbanized areas with populations greater than 100,000, including Oakland, Fremont, Hayward and Berkeley.

Due to the job opportunities in Silicon Valley, the Tri-City (Fremont, Union City and Newark) and the East

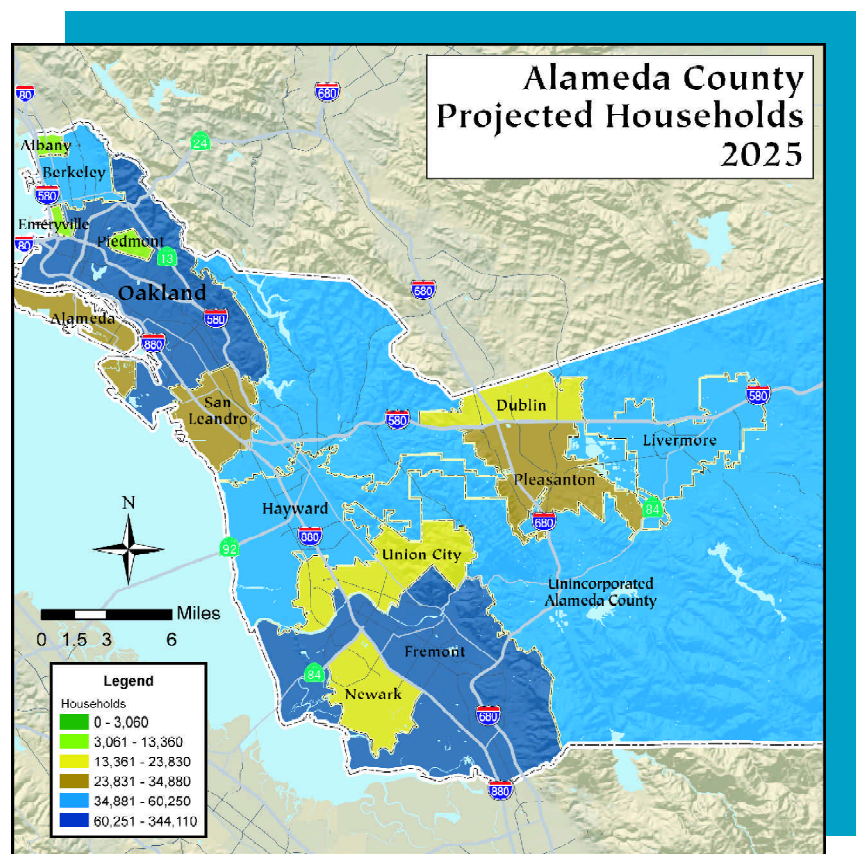
County (Livermore-Amador Valley) areas were experiencing high residential growth rates in the 1990s. These rates have since decreased, but the East County area is still projected to experience a boom, with 15,860 new households and an increased population of 48,400 between 2000 and 2010. It is estimated that the Tri-City area will add about 7,260 new households and an increased population of 31,400 during this same period.

East County is expected to have the highest population growth rate between 2000 and 2025, adding about 88,500 new residents and about 31,000 new households. Dublin is expected to have the highest percentage change from 2000-2025 with an estimated 127 percent increase over its 2000 population.

Over the long-term (2010-2025) Oakland leads the county in number of new households (12,030), followed by Livermore (6,290) and Dublin (5,880). Dublin, Livermore, and Pleasanton combine for 31 percent of the county's projected growth in households for the 2010-2025 period. (Source: *Projections 2002*, Association of Bay Area Governments)

Job Growth

The 1970s and 1980s were a period of transition for Alameda County. During these decades, the county's economy became more diverse. The southern part of the county began to attract a concentration of high technology industries. The eastern portion of the county increasingly became the center for office employ-



A l a m e d a C o u n t y

ment, communications, and the computer software industries. The northern portion of the county added more transportation-related and biotechnology employment.

In contrast to the job growth in the 1980s, Alameda County saw declining numbers of jobs during the recession of the early 1990s. Military base closures in the Cities of Oakland and Alameda accounted for particularly high job losses.

The latter part of the 1990s was an entirely different story. Growth centered particularly on jobs in business services, retail and wholesale trade, and high technology manufacturing. During this period, the county's economy not only recovered, it participated in an era of profound growth.

According to ABAG's projections, job growth between the years 2000 and 2005 is expected to be significantly slower in Alameda County than during the proceeding five years.

As the national economy continues to be weak, and the demand for computer hardware and software, and services are more limited, all sectors will see slower growth. Growth is expected to be limited to about 1 percent annually, as compared to nearly 4 percent growth in recent years.

The transformation of Alameda County's economy will continue in the future. Over the 2000-2025 forecast period, the service sector will add more than 117,500 jobs, with business services contributing more than 33,500

ALAMEDA COUNTY PROJECTIONS

	2000	2005	2010	2015	2020	2025
Total Jobs	751,680	790,400	857,450	914,790	964,740	1,014,190
Population	1,443,741	1,534,400	1,588,900	1,628,800	1,669,400	1,714,200
Households	523,366	543,400	562,010	578,540	595,400	611,680
Jobs/Housing Ratio	1.44	1.45	1.53	1.58	1.62	1.66

to that total. Retail sales and manufacturing jobs will also be leading sectors for growth.

The City of Oakland is projected to have the largest gain in jobs, with 49,550 new jobs over the next 25 years. Fremont will add the second largest total, with 38,110 new jobs. In percentage terms, Dublin will add 90 percent more jobs. The City of Alameda is close behind with an 89 percent increase to its job total by 2025.

Over the forecast period, manufacturing jobs will continue to be concentrated in cities in the southern part of the county, such as Fremont. Fremont is projected to add 12,000 manufacturing and wholesale jobs by 2025. Oakland will lead in the addition of retail jobs and other jobs. (The “other” category of jobs includes construction, transportation, finance, and government.) (Source: *Projections 2002*, Association of Bay Area Governments)

Jobs/Housing Balance

Of the IRP counties, Alameda County is on average the most “balanced”. Currently, Alameda County has a jobs/housing balance of 1.43, meaning there are 1.43 jobs for every household. Over time, however, the county will see an increase in the number of jobs available, with-

HOUSING SURPLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000-2025 Percent Change
Alameda	12,119	-1,163	-110 %
Albany	3,751	2,173	-42 %
Berkeley	-6,512	-9,830	51 %
Dublin	-4,922	-5,727	16 %
Emeryville	-8,418	-9,880	17 %
Fremont	-4,036	-20,700	413 %
Hayward	-12,763	-22,433	76 %
Livermore	443	-7,507	-1,795 %
Newark	449	-1,673	-411 %
Oakland	21,490	6,307	-71 %
Piedmont	2,697	2,687	0 %
Pleasanton	-12,482	-24,437	96 %
San Leandro	-5,511	-9,510	73 %
Union City	6,189	1,040	- 83 %
Remainder	29,662	36,207	22 %
Alameda County	22,246	-64,446	- 390 %

JOBS/HOUSING BALANCE

	2000 Jobs/Housing Ratio	2025 Jobs/Housing Ratio	2000-2025 Percent Change
Alameda	.90	1.55	73 %
Albany	.70	1.07	53 %
Berkeley	1.72	1.81	5 %
Dublin	2.29	1.91	-17 %
Emeryville	4.68	3.97	-15 %
Fremont	1.59	1.90	20 %
Hayward	1.93	2.17	13 %
Livermore	1.47	1.82	24 %
Newark	1.44	1.66	15 %
Oakland	1.29	1.44	12 %
Piedmont	.44	.46	4 %
Pleasanton	2.30	2.72	18 %
San Leandro	1.77	1.93	9 %
Union City	1.00	1.43	43 %
Remainder	.58	.58	0 %
Alameda County	1.44	1.66	15%

out the commensurate amount of housing units. By 2025, 1.66 jobs will be available per household. This represents a 15 percent increase in the number of jobs available per household.

By 2025, Alameda County will have a housing shortfall. Essentially, not enough housing units will be built to house new workers filling the additional jobs that will be created. Ideally, the county should add an additional 152,760 housing units to meet the demands of new workers. However by 2025, only 88,314 new homes will be built in the county, amounting to a shortfall of 64,446 units.

Housing shortfalls are projected to be most significant in the cities of Pleasanton, Hayward and Fremont. The City of Pleasanton is projected to see its current high jobs/housing ratio of 2.27 increase by 15 percent to 2.61 in the next 25 years. Based on the ideal jobs/housing balance of 1.5, Pleasanton should have a total of 54,753 housing units by 2025 to house their workers. It is projected that Pleasanton will fall short of this by over 23,000 units. Both Fremont and Hayward will also have over 20,000 units less than what is needed by 2025 to house workers and their families.

A l a m e d a C o u n t y

Not all cities in Alameda are projected to produce less housing than their job figures would indicate are needed. Albany, Oakland, Piedmont, Union City and the unincorporated communities of the county each have housing “surpluses,” for they are providing more housing than jobs for residents.

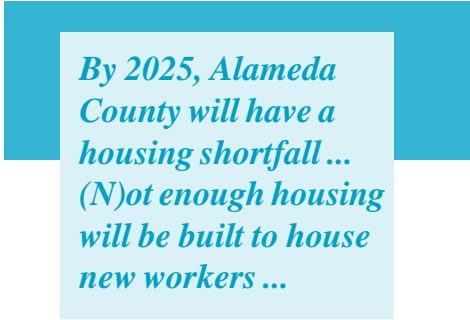
The City of Albany will strive to be more balanced in 2025, increasing its jobs/housing ratio from a low of .70 to 1.06. Even with this 51 percent increase, Albany will still have a housing surplus of well over 2,000 units by 2025.

The City of Piedmont currently and will continue to have the lowest jobs/housing ratio. In 2000, Piedmont’s jobs/housing ratio was .44. This figure is projected to increase by a mere 4.5 percent by 2025 to .46. In 2025, Piedmont is projected to have 2,687 more housing units than needed based upon their job totals.

Oakland is projected to increase its jobs/housing ratio from 1.29 to 1.44 by 2025, and to provide over 6,300 more housing units than are necessary based on a 1.5 jobs/housing ratio. The unincorporated part of the county, by far, has the largest housing surplus in the county. With a jobs/housing ratio of .54 projected for 2025, unincorporated Alameda County will provide an excess of 27,800 housing units than needed.

The city with the greatest jobs/housing imbalance in Alameda County is the City of Emeryville. The city has a current imbalance of 4.68. This figure indicates that Emeryville has numerous jobs and very few housing units for its workers. In 2000, Emeryville had 18,590 jobs

and only 3,975 housing units. Emeryville’s imbalance is projected to decrease marginally by 2025. By 2025, Emeryville will have a jobs/housing ratio of 3.97. The 2025 projected housing shortfall for the City of Emeryville is 9,580 units.



By 2025, Alameda County will have a housing shortfall ... (N)ot enough housing will be built to house new workers ...

TOTAL POPULATION

	2000	2005	2010	2015	2020	2025
Alameda	72,259	75,200	77,500	78,500	79,500	80,600
Albany	16,444	17,100	17,300	17,500	17,700	18,000
Berkeley	102,743	106,300	107,300	108,600	109,800	111,600
Dublin	29,973	39,400	47,400	52,300	57,800	63,100
Emeryville	6,882	8,200	9,000	9,500	10,400	11,200
Fremont	203,413	214,600	220,500	224,800	228,300	233,200
Hayward	140,030	148,100	150,500	153,400	156,600	160,300
Livermore	73,345	78,200	83,800	88,000	93,900	99,400
Newark	42,471	45,400	47,100	48,700	51,100	53,400
Oakland	399,484	415,700	423,200	431,500	440,000	449,500
Piedmont	10,952	11,100	11,200	11,200	11,300	11,300
Pleasanton	63,654	71,000	76,800	78,800	80,600	83,600
San Leandro	79,452	83,100	84,500	85,300	86,300	87,600
Union City	66,869	73,900	76,600	80,000	82,200	84,700
Remainder	135,770	147,100	156,200	160,700	163,900	166,700
Alameda County	1,443,741	1,534,400	1,588,900	1,628,800	1,669,400	1,714,200

TOTAL HOUSEHOLDS

	2000	2005	2010	2015	2020	2025
Alameda	30,226	31,080	31,680	32,110	32,610	33,070
Albany	7,011	7,100	7,210	7,330	7,440	7,540
Berkeley	44,955	45,280	45,640	46,160	46,710	47,650
Dublin	9,325	12,430	15,320	17,150	19,250	21,200
Emeryville	3,975	4,370	4,790	5,060	5,530	6,000
Fremont	68,237	70,350	72,240	73,960	75,370	76,980
Hayward	44,804	45,940	46,670	47,790	48,950	50,120
Livermore	26,123	27,280	29,260	30,490	32,690	35,000
Newark	12,992	13,550	14,050	14,620	15,380	16,080
Oakland	150,790	153,530	156,610	160,850	165,010	168,640
Piedmont	3,804	3,820	3,830	3,840	3,850	3,860
Pleasanton	23,311	25,370	27,420	28,190	28,910	30,010
San Leandro	30,642	31,250	31,770	32,220	32,690	33,210
Union City	18,642	20,070	20,840	21,860	22,540	23,220
Remainder	48,529	51,980	54,680	56,910	58,470	59,100
Alameda County	523,366	543,400	562,010	578,540	595,400	611,680

TOTAL JOBS

	2000	2005	2010	2015	2020	2025
Alameda	27,160	30,360	36,830	41,880	46,650	51,350
Albany	4,890	5,170	5,790	6,510	7,230	8,050
Berkeley	77,200	79,310	81,500	83,450	84,940	86,220
Dublin	21,370	22,630	27,750	31,980	36,150	40,390
Emeryville	18,590	19,670	20,990	21,670	23,000	23,820
Fremont	108,410	115,700	123,270	130,190	138,860	146,520
Hayward	86,350	91,050	96,260	98,730	103,740	108,830
Livermore	38,520	40,560	48,360	53,540	58,690	63,760
Newark	18,680	19,480	21,610	23,560	25,130	26,630
Oakland	193,950	202,080	215,580	228,380	235,510	243,500
Piedmont	1,660	1,680	1,700	1,720	1,740	1,760
Pleasanton	53,690	56,160	65,150	72,230	76,900	81,670
San Leandro	54,230	55,870	57,390	60,990	62,520	64,080
Union City	18,680	21,480	24,680	27,710	30,460	33,270
Remainder	28,300	29,200	30,590	32,250	33,220	34,340
Alameda County	751,680	790,400	857,450	914,790	964,740	1,014,190

Population & Residential Growth

Contra Costa County's population grew considerably in the 1980s, resulting in substantial changes in its physical and economic environment. According to the U.S. Census Bureau, the county's population increased by more than 22 percent during the 1980s, or by about 147,400 residents. Despite the economic downturn in the early 1990s, Contra Costa continued to grow. From 1990 to 2000, the county added another 145,100 residents, bringing its 2000 population to 948,800.

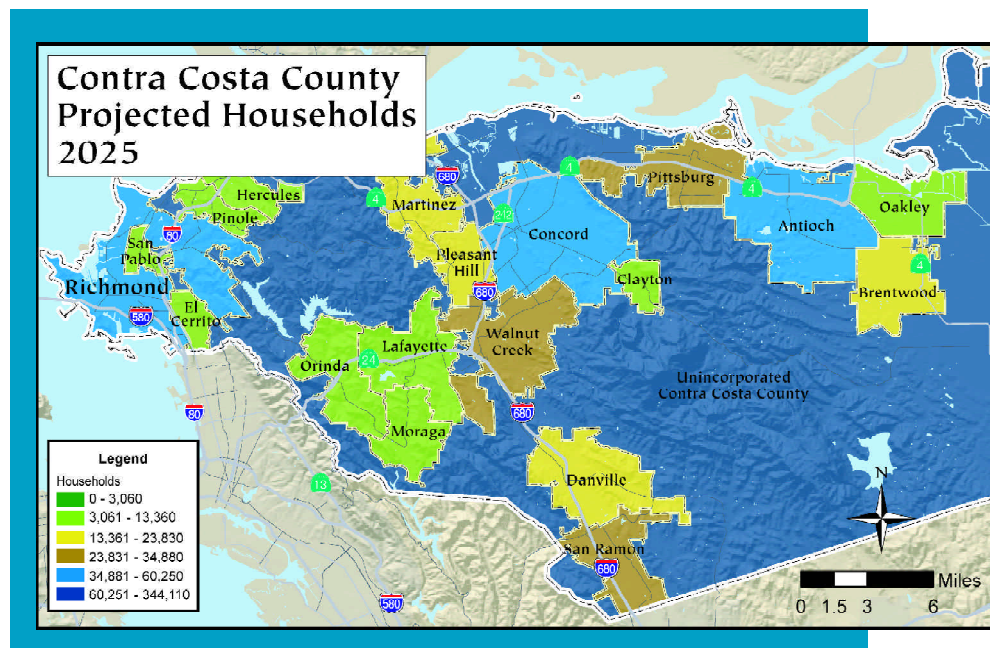
Although both the 1980s and the 1990s have brought growth to Contra Costa County, the reasons for growth in each period differ slightly. In the 1980s, Contra Costa was the beneficiary of jobs being relocated out of the Bay Area's central cities. The construction of many new commercial and industrial buildings fueled the county's growth. In the 1990s, both residential and nonresidential growth slowed. Nevertheless, Contra Costa County's population continued to expand. This expansion was primarily due to available vacant land for development at prices that permitted housing to be less expensive, and therefore, more affordable than in other

central Bay Area counties.

pected to occur between 2000 and 2010. From 2010 to 2025, the growth will be at about the same pace with 55,550 new households.

San Ramon (including Dougherty Valley) and east Contra Costa County (including Antioch Brentwood, Oakley, and Pittsburg) will dominate the county's growth in the next couple of decades. Together, almost 50 percent of new households in the county will be located in these two regions. San Ramon is expected to add 14,060 new households, more than any other city in the county. Antioch will have the second highest growth with about 11,080 projected new households expected between 2000 and 2025. Brentwood will have the third highest growth with an additional 9,930 households. Pittsburg will grow by 9,770 households. The Pittsburg/Bay Point Bay Area Rapid Transit (BART) station is the new terminus on the Concord BART line and is fueling the city's growth. (Source: *Projections 2002*, Association of Bay Area Governments)

Contra Costa County is projected to gain another 99,380 households between 2000 and 2025. Approximately 44 percent of this growth, or 43,830 households, is ex-



Job Growth

Economic growth in Contra Costa County added approximately 113,300 new jobs during the 1980s (a 56 percent growth rate). Concord, San Ramon, and Walnut Creek became major business centers in the IRP region. About 73 percent of the new jobs added in this county between 1985 and 1990 occurred in these new business centers. A substantial factor influencing this growth was the decentralization of office-related employment to San Ramon and Concord from other parts of the region, particularly San Francisco.

The northern portion of Contra Costa County is still home to heavy manufacturing industries, especially oil refining and chemicals. It is expected that this traditional sector will continue to grow, even as the county becomes more economically diverse.

In the early part of the 1990s, Contra Costa County was hit hard by the recession and was slow to recover from its effects. However, like the rest of the region, the county eventually saw substantial job growth across its economy. As a result, the county added over 46,500 jobs

during the 1990s. The majority of those jobs, over 28,800, were in the service sector. While the manufacturing sector added over 1,700 jobs, it was the slowest growing category, adding about 5.5 percent more jobs during the 1990s.

Contra Costa County's economy is expected to grow substantially in the next 25 years. Over 134,350 jobs will be added to the county's economy, 37 percent more jobs than seen in the 1990s. As with the 1990s, the largest growth will be in the service sector, with 60,670 jobs. The other category, which includes government, con-

CONTRA COSTA COUNTY PROJECTIONS

	2000	2005	2010	2015	2020	2025
Total Jobs	361,110	385,050	419,140	445,140	470,480	495,460
Population	948,816	1,013,200	1,074,500	1,128,800	1,179,500	1,209,900
Households	344,129	364,910	387,960	408,870	428,870	443,510
Jobs/Housing Ratio	1.05	1.06	1.08	1.09	1.10	1.12

struction, financial services, and utilities like telecommunications, will add 36,930 jobs during the forecast period.

San Ramon will see the greatest job growth, with 20,210 new jobs added to its economy over the next 25 years. These jobs will be predominately in service and other employment categories, including transportation, communication, utilities, government and construction. Concord will follow, with 19,130 new jobs, mostly in manufacturing and wholesale. Richmond will add 16,200 new jobs, mostly in service and in the other sectors. (Source: *Projections 2002*, Association of Bay Area Governments)

Jobs/Housing Balance

Over the next 25 years, Contra Costa County will continue to be a county that produces more housing than jobs. Jobs/housing balance is measured by the number of jobs available for each housing unit. Ideally, there should be 1.5 jobs for every household. Currently, Contra Costa County has a jobs/housing balance of 1.05, indicating that there are more housing units available than there are jobs. Over time, the county will see an increase in the number of homes available per job, with a 1.12 jobs/housing ratio by 2025. This ratio translates into

HOUSING SURPLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000-2025 Percent Change
Antioch	18,478	21,103	14 %
Brentwood	4,057	8,650	113 %
Clayton	3,070	4,010	31 %
Concord	4,980	-1,033	-121 %
Danville	8,049	7,023	-13 %
El Cerrito	4,895	4,900	0 %
Hercules	4,296	5,483	28 %
Lafayette	2,799	2,937	5 %
Martinez	893	-720	-181 %
Moraga	2,755	3,037	10 %
Oakley	5,219	5,353	3 %
Orinda	3,456	3,823	11 %
Pinole	2,876	2,637	-8 %
Pittsburg	5,408	8,997	66 %
Pleasant Hill	2,200	1,917	-13 %
Richmond	4,345	-1,103	-125 %
San Pablo	3,811	3,250	-15 %
San Ramon	-8,483	-7,900	-7 %
Walnut Creek	-10,252	-14,383	40 %
Remainder	40,537	55,223	36 %
Contra Costa County	103,389	113,203	9 %

JOBS/HOUSING BALANCE			
	2000 Jobs/Housing Ratio	2025 Jobs/Housing Ratio	2000-2025 Percent Change
Antioch	.56	.72	29 %
Brentwood	.69	.76	10 %
Clayton	.31	.30	-5 %
Concord	1.33	1.53	15 %
Danville	.69	.84	23 %
El Cerrito	.78	.83	6 %
Hercules	.50	.57	15 %
Lafayette	1.04	1.08	4 %
Martinez	1.41	1.57	11 %
Moraga	.77	.79	3 %
Oakley	.50	.87	73 %
Orinda	.71	.74	3 %
Pinole	.86	.99	15 %
Pittsburg	1.04	1.01	-3 %
Pleasant Hill	1.26	1.32	5 %
Richmond	1.31	1.54	18 %
San Pablo	.87	1.00	15 %
San Ramon	2.25	1.88	-16 %
Walnut Creek	2.01	2.13	6 %
Remainder	.40	.39	-3 %
Contra Costa County	1.05	1.12	6 %

113,200 more housing units than required based on their level of job production in the county.

A sizable housing surplus by 2025 in Contra Costa County means that essentially more housing units will be built there than are necessary to house new workers filling the additional jobs that will be created in the county. Ideally, the county should have 330,306 housing units to meet the demands of new workers. However by 2025, Contra Costa County will have over 443,510 households, amounting to a surplus of 113,203 units.

Housing surpluses are most significant in eastern Contra Costa County. Together, the cities of Antioch, Brentwood, Pittsburg, Oakley and unincorporated eastern Contra Costa County have a housing surplus of over 37,792 units. By 2025, that figure will be 51,860 units, amounting to 46 percent of the County's housing surplus. Because job development is being outpaced by housing development, new residents of these cities will most likely travel to other parts of the Bay Area for work. Likely destinations in Contra Costa County may be San Ramon or Walnut Creek. Together, these cities are under-producing housing by 18,735 units. In other words, these communities are producing more jobs than housing, arguably pushing the housing need to more outlying areas in the County or the region.

C o n t r a C o s t a C o u n t y

Most jurisdictions in Contra Costa County have a jobs/housing balance number that reflects their tendency to build more housing than jobs. The City of Clayton currently and will continue to have the lowest jobs/housing ratio in the county. In 2000, Clayton's jobs/housing ratio was .31. This figure is projected to further decrease to .30 by 2025. Clayton is projected to have 4,010 more housing units than needed based upon its job totals. Clearly, Clayton is a bedroom community, where jobs are scarce and housing is abundant.


At .50, the City of Hercules holds the second lowest jobs/housing balance ratio in the county. Hercules will see a modest 15 percent

increase in its jobs/housing ratio which will reach .57 by 2025. In 2000, Hercules had 4,296 more housing units than needed to have a jobs/housing balance of 1.5. In 2025, Hercules is projected to over produce 4,900 units.

Not all cities in Contra Costa are projected to produce more housing than their job figures would indicate are needed. Both San Ramon and Walnut Creek currently produce more jobs than housing. In 2000, San Ramon had a jobs/housing ratio of 2.25, resulting in a

housing shortfall of 8,483 housing units. In the coming decades, San Ramon will move closer to a jobs/housing balance, moving to 1.88 jobs per household by 2025.

While San Ramon will see an improvement in their jobs/housing ratio, the City of Walnut Creek will not fair so well. Currently, Walnut Creek has the second highest jobs/housing ratio (behind San Ramon) at 2.01. By 2025, Walnut Creek will have continued to produce more jobs than housing and will end up with a jobs/housing ratio of 2.13. This works out to a shortage of 14,383 housing units by 2025, an increase of 40 percent over 2000 levels.



Over the next 25 years, Contra Costa County will continue to be a county that produces more housing than jobs.

TOTAL POPULATION

	2000	2005	2010	2015	2020	2025
Antioch	90,532	94,000	101,700	107,900	114,600	117,500
Brentwood	23,302	29,700	36,400	43,000	48,500	52,700
Clayton	10,762	11,100	11,700	12,200	12,800	13,500
Concord	121,780	127,600	130,700	134,200	136,900	138,500
Danville	41,715	43,200	43,900	44,700	45,200	45,500
El Cerrito	23,171	24,000	24,300	24,500	24,600	24,700
Hercules	19,488	20,900	22,500	23,600	25,200	26,100
Lafayette	23,908	25,000	25,600	26,000	26,600	27,100
Martinez	35,866	37,100	38,400	39,500	40,300	40,700
Moraga	16,290	16,600	17,000	17,400	17,900	18,100
Oakley	25,619	30,400	33,400	36,300	38,800	40,300
Orinda	17,599	17,900	18,400	18,800	19,300	19,600
Pinole	19,039	19,600	20,200	20,700	21,200	21,400
Pittsburg	56,769	61,600	69,200	76,300	82,700	85,100
Pleasant Hill	32,837	34,500	36,000	36,700	37,200	37,500
Richmond	99,216	104,600	106,900	108,700	110,700	112,200
San Pablo	30,215	30,900	31,200	31,700	32,100	32,200
San Ramon	44,722	52,400	59,900	68,300	75,700	82,500
Walnut Creek	64,296	66,300	68,100	69,900	71,100	71,800
Remainder	151,690	165,800	179,000	188,400	198,100	202,900
Contra Costa County	948,816	1,013,200	1,074,500	1,128,800	1,179,500	1,209,900

TOTAL HOUSEHOLDS

	2000	2005	2010	2015	2020	2025
Antioch	29,338	31,590	34,250	36,470	38,910	40,410
Brentwood	7,497	9,610	11,830	14,050	15,930	17,430
Clayton	3,883	4,060	4,290	4,500	4,720	5,010
Concord	44,020	45,960	47,230	48,690	49,830	50,760
Danville	14,816	15,420	15,550	15,700	15,880	16,010
El Cerrito	10,208	10,490	10,660	10,820	10,890	10,980
Hercules	6,423	6,850	7,440	7,870	8,500	8,850
Lafayette	9,152	9,510	9,790	10,000	10,320	10,610
Martinez	14,300	14,740	15,280	15,750	16,180	16,560
Moraga	5,662	5,780	5,950	6,120	6,340	6,430
Oakley	7,832	9,160	10,140	11,130	12,040	12,680
Orinda	6,596	6,760	6,970	7,180	7,360	7,530
Pinole	6,743	6,930	7,180	7,390	7,570	7,730
Pittsburg	17,741	19,240	21,790	24,250	26,510	27,510
Pleasant Hill	13,753	14,290	14,960	15,280	15,580	15,770
Richmond	34,625	36,470	37,390	38,190	39,090	39,970
San Pablo	9,051	9,140	9,240	9,450	9,580	9,690
San Ramon	16,944	19,560	22,470	25,410	28,290	31,000
Walnut Creek	30,301	30,970	31,950	32,970	33,610	34,230
Remainder	55,244	58,380	63,600	67,650	71,740	74,350
Contra Costa County	344,129	364,910	387,960	408,870	428,870	443,510

TOTAL JOBS

	2000	2005	2010	2015	2020	2025
Antioch	16,290	17,410	20,570	24,100	26,430	29,860
Brentwood	5,160	5,490	6,790	8,650	11,010	13,170
Clayton	1,220	1,240	1,280	1,320	1,400	1,500
Concord	58,560	61,870	65,520	69,430	72,640	77,690
Danville	10,150	10,820	11,880	12,120	12,550	13,480
El Cerrito	7,970	8,120	8,490	8,620	8,770	9,120
Hercules	3,190	3,430	4,080	4,390	4,710	5,050
Lafayette	9,530	9,710	10,290	10,520	10,980	11,510
Martinez	20,110	21,520	23,340	23,860	24,870	25,920
Moraga	4,360	4,430	4,690	4,910	5,000	5,090
Oakley	3,920	4,260	5,420	6,930	8,890	10,990
Orinda	4,710	4,880	5,170	5,280	5,460	5,560
Pinole	5,800	5,930	6,280	6,540	7,120	7,640
Pittsburg	18,500	20,240	22,790	23,890	25,950	27,770
Pleasant Hill	17,330	18,130	19,000	19,130	19,930	20,780
Richmond	45,420	50,390	53,860	56,400	59,100	61,610
San Pablo	7,860	8,420	8,890	9,350	9,530	9,660
San Ramon	38,140	42,140	48,450	53,380	56,830	58,350
Walnut Creek	60,830	63,760	67,380	69,740	71,600	72,920
Remainder	22,060	22,860	24,970	26,580	27,710	28,690
Contra Costa County	361,110	385,050	419,140	445,140	470,480	495,460

Population & Residential Growth

San Joaquin County's population grew at an average annual rate of 1.6 percent during the 1990s, reaching a total population of 566,600 in 2000. The most rapid growth occurred in the communities located in the southern portion of the county, and the largest absolute growth oc-

curred in the City of Stockton (32,828 net gain in the past ten years).

The rapid population growth in San Joaquin County is heavily attributed to Bay Area jobholders taking up residence in the

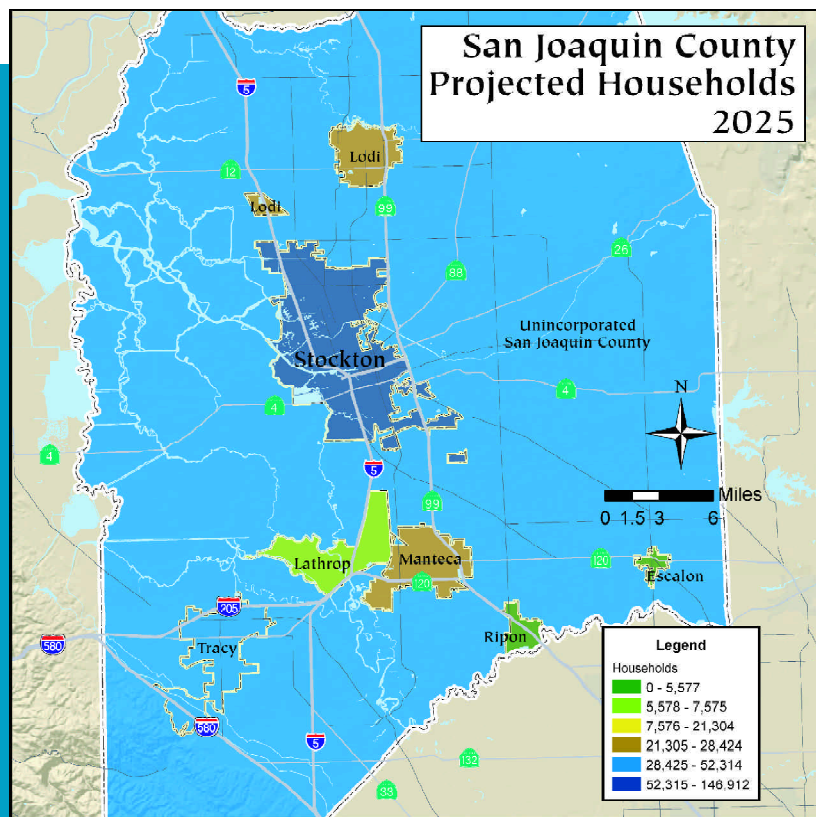
More than 12,000 San Joaquin County residents commute to Alameda County ...

county. From 1990 to 2000, the population of the City of Tracy, the western most city in the county, grew more than 69 percent, compared to the overall growth of the county of 17 percent during the same time period (2000 Census). Tracy's share of the county's population has increased 3 percent in the past decade, while the unincorporated areas' share dropped 3 percent. In addition, Tracy and Stockton alone accounted for nearly 70 percent of the absolute population growth in the county from 1990 to 2000.

San Joaquin County of 333,738 persons (59 percent) by 2025, for a total population of 900,338 persons. The southern portion of San Joaquin County will continue to see the greatest population growth. Tracy, Lathrop, and Ripon will have, respectively 153 percent (137,341 persons), 140 percent (23,902 persons) and 127 percent (23,637 persons) population growth by 2025. Tracy is projected to surpass Lodi and become the second most populous city in the county by 2005.

Over the 2000-2025 period, total household growth is projected to increase 57 percent throughout San Joaquin County from 202,320 to 316,768 units. This growth is divided between single-family and multi-family units at 61 and 49 percent respectively. The highest rate of household growth is projected for the cities of Lathrop and Tracy. By 2025 Lathrop is expected to gain an additional 4,013 housing units (113 percent growth) while Tracy is expected to gain 21,296 housing units (94 percent growth). The highest number of new household development between 2000 and 2025 will be experienced in Stockton (46,584 units) and the unincorporated region of San Joaquin County (23,676 units).

Based on these recent growth trends, current projections indicate an increase in population in



Job Growth

Based on the latest “Industry Trends and Outlook” prepared by the California Employment Development Department in 1997, San Joaquin County will continue to experience employment growth as the region’s economy continues to expand and diversify. The total number of non-farm jobs is expected to increase by 37,500 during the seven-year (1997-2004) projection period, an increase of 22 percent. In contrast, there was a slight decline (-2 percent) in agricultural employment between 1985 and 2000.

San Joaquin County’s growth will be fueled by a number of factors, including a strategic location, an expected strong state economy, affordable land, population growth, and spill-over business expansions from the San Francisco Bay Area to the Central Valley. Employment gains are anticipated across all major industry divisions with the largest absolute increases occurring in services, trade and government.

Benefiting from the county’s centralized location for trucking and warehouse distribution operations, which serves the larger western mar-

kets connected by Interstates 5 and 580, employment in the transportation industry is anticipated to expand by 2,000 jobs (a 27 percent increase) by 2004. Of all the major industries, finance, insurance, and real estate industries stand out as experiencing rapid changes in the last decade. This is mainly due to the mergers and restructuring in the finance sector during the mid 1990s. Nearly two thousand new jobs in these industries are projected to be added in the county by 2004, marking a 22 percent growth since 1997.

SAN JOAQUIN COUNTY PROJECTIONS

	2000	2005	2010	2015	2020	2025
Total Jobs	201,671	218,051	234,430	250,810	267,189	283,569
Population	566,600	633,348	700,095	766,843	821,851	900,338
Households	202,320	225,185	248,094	270,994	293,903	316,768
Jobs/Housing Ratio	1.00	.97	.94	.93	.91	.90

Projections indicate that employment in San Joaquin County will remain at its current growth rate, and will reach 283,569 jobs by 2025, an increase of 81,898. The average employment growth rate from 2000 to 2025 will be 41 percent. Stockton, the unincorporated areas, and Lodi will share more than 79 percent of the employment gains, 44 percent, 20 percent and 15

percent respectively. In addition, Tracy will account for 9 percent of the employment growth, while Manteca will account for 8 percent. Ripon, Lathrop, and Escalon will contribute 2 percent, 2 percent, and 1 percent respectively. It is expected that other areas in the county will increasingly offer more employment opportunities, although Stockton is projected to remain the employment center for the region

Jobs/Housing Balance

Rapid job expansion throughout the Bay Area, beginning in the last two decades, has fueled a growing demand for the limited Bay Area housing supply. The economic boom of the technology sector has driven out many families who could no longer afford to live in the Bay Area. The shortage of affordable housing in the Bay Area has led to increased subdivision activity in San Joaquin County, where lower land costs created a profitable setting for new housing development. By 2000, the aggregate jobs/housing ratio across San Joaquin County was 1.00 with the cities of Tracy, Lathrop, and Stockton showing the greatest disparity with jobs/housing ratios of 0.75, 0.88, and 0.88 respectively.

As indicated by 1990 Census Journey to Work data, Alameda, Contra Costa, and Santa Clara counties are the major Bay Area worker importers from San Joaquin County. More than 12,000 San Joaquin County residents commute to Alameda County, 2,827 commute to Contra Costa County, and 3,380 commute to Santa Clara County. Overall, there were about 10,400 more commuters leaving San Joaquin County than arriving in 1990 (Source: 1990 Census Transportation Planning Package).

HOUSING SURPLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000-2025 Percent Change
Escalon	747	-1,531	-305 %
Lathrop	1,467	4,629	216 %
Lodi	2,980	-841	-128 %
Manteca	7,765	13,995	80 %
Ripon	488	1,904	290 %
Stockton	41,573	64,297	55 %
Tracy	11,273	27,943	148 %
Remainder	1,579	14,265	803 %
San Joaquin County	67,872	127,722	84 %

The regional income disparities help to explain the attractiveness of Bay Area jobs to San Joaquin County workers. The average income per capita in the Bay Area was well above San Joaquin County in 1999. While the average income per capita for San Joaquin County stood at \$21,544 (Bureau of Economic Analysis, U.S. Department of Commerce, 2000), the average income per capita in Alameda, Contra Costa and Santa Clara Counties stood at \$34,131, \$37,994, and \$46,649 respectively. Although the income gap between the central Bay Area and San Joaquin County may not remain so extreme in the long run, the San Joaquin Council of Governments foresees a continuation of worker importing from San Joaquin County into the Bay Area coupled with the expansion of the Bay Area housing market into San Joaquin County.

In October 2000, the San Joaquin Council of Governments undertook a survey (Altamont Pass Commuter Survey) to study commute patterns originating in San Joaquin County with destinations in the Bay Area. The findings were what most had expected. A majority of commuters are traveling to East and South Bay destinations while a smaller number are going to North Bay or Peninsula destinations. Average commute

times were approximately 1.4 hours with departures times prior to 6 am. Most of these commuters occupy a single occupant vehicle on one corridor for their commute. The transportation mode split was: 78 percent Single Occupant Vehicle (SOV), 14 percent carpool, 1 percent vanpool, 4 percent Altamont Commuter Express train, and 2 percent bus.

Current employment and housing projections indicate a 10 percent decrease between the 2000 and 2025 jobs/housing ratio for San Joaquin County with jobs per household dropping from 1.00 to .90. This trend is expected to be most severe in the cities of Lathrop (34 percent decrease to 0.58 jobs/household) and Tracy (28 percent decrease to 0.55 jobs/household).

JOBS/HOUSING BALANCE			
	2000 Jobs/Housing Ratio	2025 Jobs/Housing Ratio	2000-2025 Percent Change
Escalon	1.01	.88	-13 %
Lathrop	.88	.58	-34 %
Lodi	1.31	1.54	18 %
Manteca	.85	.76	-11 %
Ripon	1.26	.99	-22 %
Stockton	.88	.84	-4 %
Tracy	.75	.55	-28%
Remainder	1.42	1.09	-23 %
San Joaquin County	1.00	.90	-10 %

TOTAL POPULATION

	2000	2005	2010	2015	2020	2025
Escalon	5,825	6,637	7,448	8,260	8,929	9,883
Lathrop	9,975	12,760	15,546	18,331	20,627	23,902
Lodi	57,900	60,843	63,787	66,730	69,156	72,617
Manteca	49,500	56,874	64,248	71,622	77,699	86,370
Ripon	10,400	13,047	15,695	18,342	20,524	23,637
Stockton	247,400	279,216	311,033	342,849	374,631	406,482
Tracy	54,200	70,828	87,456	104,084	117,788	137,341
Remainder	131,400	133,141	134,881	136,622	138,056	140,103
San Joaquin County	566,600	633,348	700,095	766,843	821,851	900,338

TOTAL HOUSEHOLDS						
	2000	2005	2010	2015	2020	2025
Escalon	2,290	2,573	2,853	3,137	3,417	3,700
Lathrop	3,562	4,366	5,171	5,966	6,771	7,575
Lodi	23,708	24,624	25,548	26,464	27,388	28,304
Manteca	18,027	20,108	22,186	24,265	26,343	28,424
Ripon	3,101	3,596	4,092	4,586	5,082	5,577
Stockton	100,328	109,635	118,958	128,282	137,605	146,912
Tracy	22,666	26,920	31,184	35,444	39,708	43,962
Remainder	28,638	33,363	38,102	42,850	47,589	52,314
San Joaquin County	202,320	225,185	248,094	270,994	293,903	316,768

TOTAL JOBS						
	2000	2005	2010	2015	2020	2025
Escalon	2,314	2,502	2,690	2,878	3,066	3,254
Lathrop	3,143	3,398	3,653	3,909	4,164	4,419
Lodi	31,092	33,617	36,142	38,667	41,193	43,718
Manteca	15,393	16,643	17,893	19,144	20,394	21,644
Ripon	3,919	4,237	4,555	4,873	5,192	5,510
Stockton	88,133	95,291	102,449	109,607	116,765	123,923
Tracy	17,089	18,477	19,865	21,253	22,640	24,028
Remainder	40,589	43,866	47,183	50,479	53,776	57,073
San Joaquin County	201,671	218,051	234,430	250,810	267,189	283,569

Population & Residential Growth

Santa Clara County is the most populous county in the IRP region. The county population was 1,682,585 in 2000, and by 2025, it is expected to reach over 2,064,000. Within the county and the IRP area, San Jose is by far the

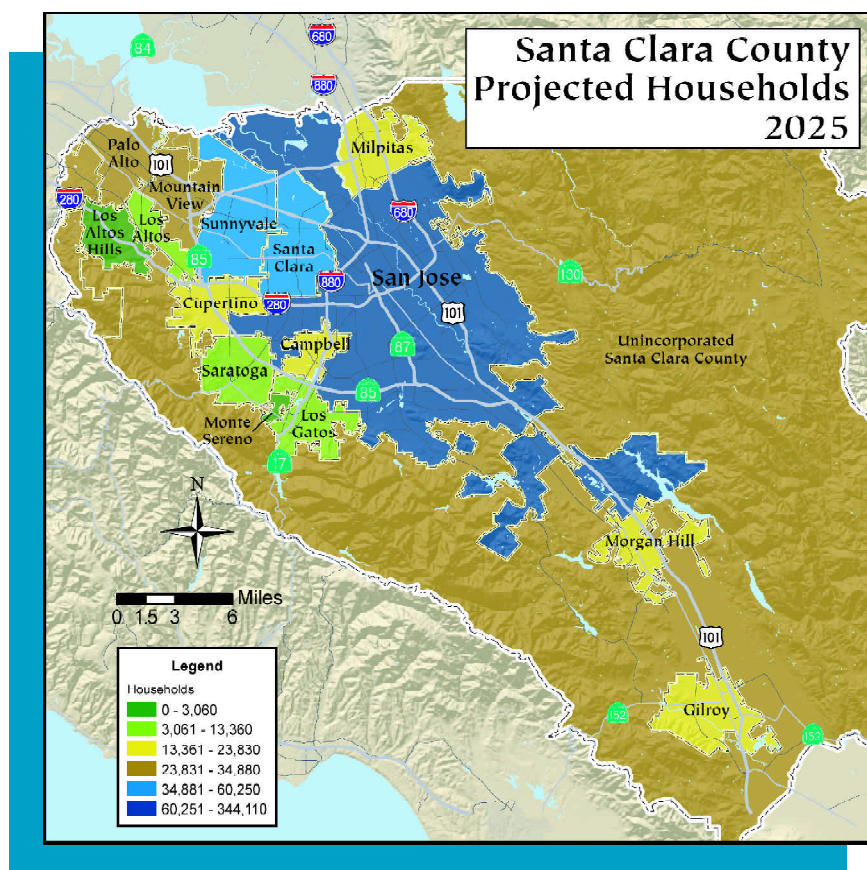
most populous jurisdiction. In 2000, San Jose's population was 894,943 or 53 percent of the county's total. San Jose has about seven times the population of Sunnyvale, the county's second largest city (population 131,760). In 2025, San Jose's share of the county's population will remain at approximately 53 percent.

San Jose will also capture 58 percent of Santa Clara County's household growth between 2000 and 2010 (35,512 households) and 47 percent of the household growth between 2010 and 2025 (32,000 households). Gilroy and Santa Clara follow San Jose, with expected household increases of 3,661 and 4,824 respectively from 2000 to 2010. (Source: *Projections 2002*, Association of Bay Area Governments)

Job Growth

In the 1980s, Santa Clara County added many new jobs. Electronics companies, defense contractors, and the increases in manufacturing facilities created extensive economic growth. However, the recession of the early 1990s was particularly evident in Santa Clara County. Slowing in the electronics industry, the end of the defense build up, and the conversion of military bases all affected the county's economy.

The end of the 1990s saw tremendous growth in Santa Clara County as Silicon Valley became the embodiment of the "New Economy" driven by the efficiencies from computers, communications and the use of the internet. During the 1990s, the county added 201,400 jobs. Traditionally a center for manufacturing, the county actually lost jobs in that sector. Service jobs, particularly business services



Between 1990 and 2000, Santa Clara County added about 45,683 households, reflecting a 9 percent increase. This numerical increase is the largest of the Bay Area IRP counties. During the 2000-2025 period, Santa Clara County can expect a population increase of about 381,615 persons and 129,307 households. Over half (52 percent) of the county's household growth will occur in San Jose. San Jose will outstrip all the IRP counties in terms of absolute growth, expanding by 201,257 people and 67,512 households.

S a n t a C l a r a C o u n t y

jobs, increased by 152,750, accounting for more than 75 percent of new jobs. Job growth continued in some sectors throughout 2000, even as the news media reported the demise of dot-com companies.

In many ways, companies that provided the services and materials for internet companies eventually accounted for most of the job losses. Expectations for the expansion of the

internet and telecommunications caused a variety of more established companies to expand to meet demand and to insure that they had developed the latest technology. When those expectations changed, it was companies that made equipment and provided business services, not the pure internet companies, that really caused a shift in the county's economic fortunes.

Santa Clara County is projected to see limited job growth in the first ten years of the forecast period, with a little less than 124,000 new jobs. While the technology sector is expected to grow again and to remain a critical part of the economy, service jobs will account for about 38 percent of new jobs in the county during the next ten years. These 47,320 new service jobs will represent the sector with the largest numeri-

SANTA CLARA COUNTY PROJECTIONS

	2000	2005	2010	2015	2020	2025
Total Jobs	1,092,330	1,130,860	1,216,200	1,288,800	1,341,430	1,395,830
Population	1,682,585	1,788,300	1,879,700	1,949,500	2,007,500	2,064,200
Households	565,863	596,760	626,730	652,470	674,410	695,170
Jobs/Housing Ratio	1.93	1.89	1.94	1.98	1.99	2.01

cal increase, but it is not anticipated that there will be a return to a situation like the late 1990s, either in growth of high technology jobs or the growth in jobs in general.

Over the entire forecast period, Santa Clara County is expected to add 303,500 jobs, more than any other county in the IRP region. In percentage terms, Santa Clara County will see an 28 percent increase in total jobs. Service jobs will represent 37 percent of the county's new jobs growth, continuing the trend toward more balanced growth.

As the largest city in the county, San Jose will add 126,770 jobs, followed by Sunnyvale with 36,950 additional jobs and Santa Clara with 34,300 jobs. In percentage terms, Gilroy will see the largest growth at 87 percent, followed by Morgan Hill with 71 percent. Job growth is expected to move farther south in the county over time. For example, San Jose has been discussing the development of Coyote Valley. While immediate plans for development in that area have been scaled back, it is expected to eventually be developed. (Source: *Projections 2002*, Association of Bay Area Governments)

Jobs/Housing Balance

Jobs/housing balance issues are especially evident in Santa Clara County. Of the IRP counties, Santa Clara County is on average the least "balanced." Currently, Santa Clara County

HOUSING SURPLUSES AND SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000-2025 Percent Change
Campbell	-1,747	-3,990	128 %
Cupertino	-11,983	-15,003	25 %
Gilroy	-1,138	-3,810	235 %
Los Altos	2,782	2,277	-18 %
Los Altos Hills	927	1,133	22 %
Los Gatos	-985	-3,120	217 %
Milpitas	-16,388	-22,530	37 %
Monte Sereno	684	963	41 %
Morgan Hill	1,646	1,157	-30 %
Mountain View	-19,005	-26,700	40 %
Palo Alto	-44,044	-50,553	15 %
San Jose	-8,515	-25,517	200 %
Santa Clara	-52,114	-62,707	20 %
Saratoga	5,490	5,633	3 %
Sunnyvale	-30,488	-47,410	56 %
Remainder	12,520	14,793	18 %
Santa Clara County	-162,357	-235,383	45 %

JOBS/ HOUSING BALANCE

	2000 Jobs/Housing Ratio	2025 Jobs/Housing Ratio	2000-2025 Percent Change
Campbell	1.66	1.85	11 %
Cupertino	2.49	2.47	-1 %
Gilroy	1.64	1.78	8 %
Los Altos	1.10	1.20	9 %
Los Altos Hills	.99	.94	-5 %
Los Gatos	1.62	1.85	14 %
Milpitas	2.93	2.92	-1 %
Monte Sereno	.65	.57	-13 %
Morgan Hill	1.27	1.40	10 %
Mountain View	2.41	2.65	10 %
Palo Alto	4.12	4.19	2 %
San Jose	1.55	1.61	4 %
Santa Clara	3.53	3.35	-5 %
Saratoga	.71	.79	11 %
Sunnyvale	2.37	2.68	13 %
Remainder	.89	.85	-5 %
Santa Clara County	1.93	2.01	4 %

has a jobs/housing balance of 1.93, meaning there are 1.93 jobs for every household. Over time, however, the county will see an increase in the number of jobs available, without the commensurate amount of housing units. By 2025, 2.01 jobs will be available per household. This represents a 4 percent increase in the number of jobs available per household in the county.

Most of Santa Clara County lies in the heart of the Silicon Valley. Over the last decade, Silicon Valley has experienced tremendous employment growth. In most Santa Clara County jurisdictions, housing production did not keep pace with the development of jobs. As a result, most communities in the county have jobs/housing imbalances. This imbalance translates into major existing and projected housing shortfalls. Essentially, not enough housing units will be built to house new workers filling the additional 303,500 jobs that will be created in Santa Clara County. Ideally, by 2025 the county should have 930,553 housing units to meet the demands of all their workers. However by 2025, only 129,307 new homes will be built in the county, amounting to a total shortfall of 235,383 units.

Housing shortfalls are projected to be most significant in the cities of Santa Clara, Palo Alto, and Sunnyvale. The City of Santa Clara is projected to see its current high housing short-

fall of 52,114 units increase to 62,707 in the next 20 years. Based on the ideal jobs/housing balance of 1.5, Palo Alto should have a total of 78,693 housing units by 2025 to house its workers. It is projected that Palo Alto will fall short of this by over 50,550 units. The City of Sunnyvale will have over 47,000 units less than what is needed by 2025 to house workers and their families.

The cities of Mountain View, San Jose, and Milpitas are also experiencing housing development that has not kept pace with the development of new jobs. By 2025, Mountain View will see its housing shortfall increase from its current high of 19,005 to 26,700 units, bringing it to a jobs/housing ratio of 2.65.

Although San Jose has a relatively balanced jobs/housing ratio at 1.55, that figure is projected to increase to 1.61 by 2025. Because the number of jobs and housing units is so high

in San Jose, this seemingly small imbalance actually translates into a shortfall of 25,500 housing units.

In ratio terms, the city of Milpitas will see a slight improvement in its jobs/housing balance from 2000 to 2025. In absolute terms, Milpitas will see an increase in the number of housing units, however they will be short in achieving a jobs/housing balance. In 2000, Milpitas under-produced housing, in relationship to their job development, by 16,388 units. By 2025, that figure will reach 22,530 units.

Not all cities in Santa Clara are projected to produce less housing than their job figures would indicate are needed. Saratoga, Morgan Hill, Los Altos, Los Altos Hills, and Monte Sereno, and the unincorporated communities of the county each have housing “surpluses,” for they are providing more housing than jobs for residents. Paradoxically, these areas are also the highest income communities in Santa Clara County, therefore, most housing, however abundant, is unaffordable to the many Santa Clara County workers.

In most Santa Clara County jurisdictions, housing production did not keep pace with the development of jobs. As a result, most communities in the county have jobs/housing imbalances.

TOTAL POPULATION

	2000	2005	2010	2015	2020	2025
Campbell	38,138	39,100	40,000	40,700	41,200	41,700
Cupertino	50,546	54,900	58,100	60,800	62,700	64,500
Gilroy	41,464	47,900	54,900	60,400	65,900	71,300
Los Altos	27,693	28,300	28,600	28,900	29,300	29,700
Los Altos Hills	7,902	8,300	8,500	8,600	8,700	8,900
Los Gatos	28,592	29,700	30,700	31,600	32,000	32,500
Milpitas	62,698	68,300	72,400	77,500	82,000	86,200
Monte Sereno	3,483	3,800	4,000	4,100	4,200	4,400
Morgan Hill	33,556	38,500	42,100	45,900	49,500	52,400
Mountain View	70,708	73,100	75,200	77,900	79,700	80,700
Palo Alto	58,598	61,200	63,000	64,800	66,500	67,500
San Jose	894,943	956,800	1,010,700	1,044,300	1,069,200	1,096,200
Santa Clara	102,361	108,600	115,700	122,000	128,300	134,000
Saratoga	29,843	31,000	31,500	32,100	32,900	33,600
Sunnyvale	131,760	136,200	139,300	142,700	146,400	150,100
Remainder	100,300	102,600	105,000	107,200	109,000	110,500
Santa Clara County	1,682,585	1,788,300	1,879,700	1,949,500	2,007,500	2,064,200

TOTAL HOUSEHOLDS

	2000	2005	2010	2015	2020	2025
Campbell	15,920	16,220	16,480	16,820	17,080	17,330
Cupertino	18,204	19,700	20,650	21,740	22,490	23,190
Gilroy	11,869	13,590	15,530	17,170	18,830	20,510
Los Altos	10,462	10,580	10,680	10,860	11,030	11,210
Los Altos Hills	2,740	2,830	2,890	2,940	3,000	3,060
Los Gatos	11,988	12,230	12,520	12,820	13,090	13,360
Milpitas	17,132	18,690	19,840	21,220	22,610	23,830
Monte Sereno	1,211	1,300	1,350	1,400	1,470	1,550
Morgan Hill	10,846	12,130	13,410	14,690	15,910	16,890
Mountain View	31,242	32,060	32,810	33,610	34,340	34,880
Palo Alto	25,216	25,980	26,500	27,060	27,630	28,140
San Jose	276,598	294,450	312,110	325,140	334,700	344,110
Santa Clara	38,526	40,660	43,350	45,910	48,480	50,800
Saratoga	10,450	10,720	10,970	11,220	11,530	11,880
Sunnyvale	52,539	54,070	55,380	56,960	58,630	60,250
Remainder	30,920	31,550	32,260	32,910	33,590	34,180
Santa Clara County	565,863	596,760	626,730	652,470	674,410	695,170

TOTAL JOBS

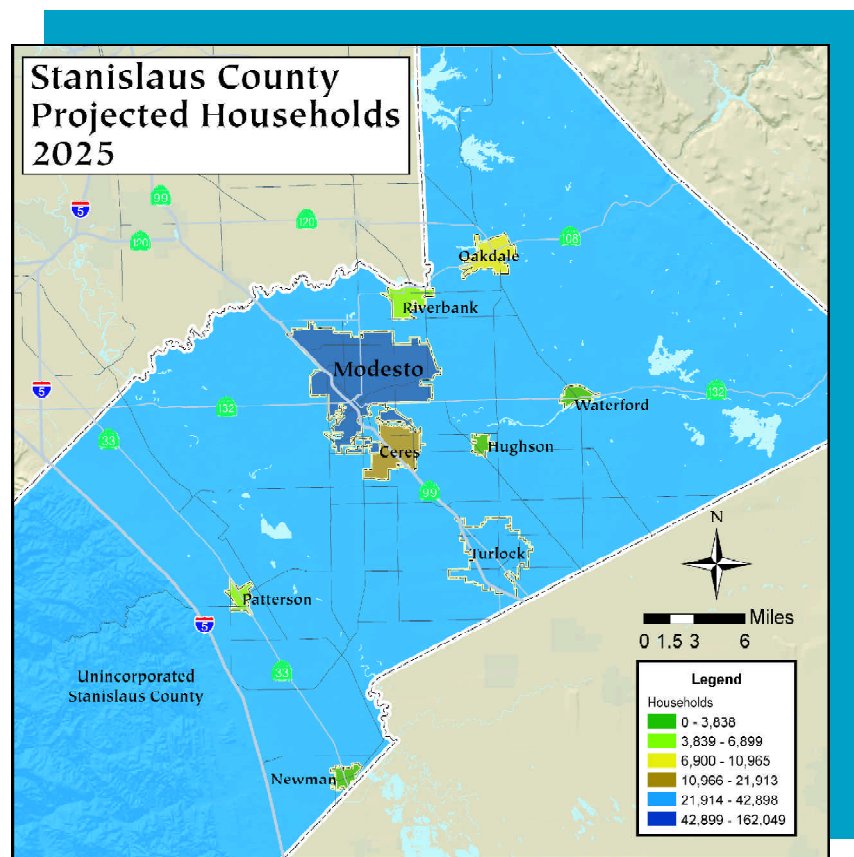
	2000	2005	2010	2015	2020	2025
Campbell	26,500	27,190	27,900	29,030	30,700	31,980
Cupertino	45,280	47,630	52,490	54,240	55,830	57,290
Gilroy	19,510	20,540	24,190	30,430	33,960	36,480
Los Altos	11,520	11,590	11,960	12,400	12,910	13,400
Los Altos Hills	2,720	2,730	2,760	2,810	2,850	2,890
Los Gatos	19,460	19,930	20,910	22,330	23,530	24,720
Milpitas	50,280	53,310	59,330	63,740	66,760	69,540
Monte Sereno	790	800	820	840	860	880
Morgan Hill	13,800	14,480	16,590	18,860	21,230	23,600
Mountain View	75,370	76,710	82,830	85,830	89,060	92,370
Palo Alto	103,890	104,920	106,510	107,560	108,190	118,040
San Jose	427,670	443,590	482,390	511,140	531,570	554,440
Santa Clara	135,960	140,820	151,190	159,280	165,070	170,260
Saratoga	7,440	7,710	7,840	8,400	8,890	9,370
Sunnyvale	124,540	129,220	139,200	147,920	154,030	161,490
Remainder	27,600	29,690	29,290	33,990	35,990	29,080
Santa Clara County	1,092,330	1,130,860	1,216,200	1,288,800	1,341,430	1,395,830

Population & Residential Growth

Stanislaus County's population is projected to reach nearly 826,125 people by 2025. With a current population of almost 447,000, this represents an 85 percent increase in population in less than 25 years.

For the first time in its history, Stanislaus County has two urbanized areas, Modesto and Turlock. Modesto is currently the most populous city in the county, with almost 189,000 residents. By 2025, Modesto is projected to increase its population by 133 per-

A significant cause of growth in Stanislaus County has been the availability of relatively low cost housing for workers from the Bay Area ...



cent to 439,750 people. The City of Turlock, the second most populous city in the county, has a current population of 55,810. In less than 25 years, Turlock will have over 97,000 residents, reflecting a 75 percent increase.

A significant cause of growth in Stanislaus County has been the availability of relatively low cost housing for workers from the Bay Area and other surrounding counties. In 1990, there were almost 24,500 employed persons who worked outside of Stanislaus County, representing 17 percent of the work-force. By 2000

that number had increased to over 35,500 employed persons, representing 21 percent of the work-force.

Two cities and three unincorporated communities in Stanislaus County have a significant percentage of out of county commuters. In the cities of Patterson and Newman, both located near Interstate 5 (I-5), 40 percent and 42 percent, respectively, of the work-force commutes out of the county. Two small communities near I – 5, Grayson and Westley also had high percentages of commuters in 2000, with 43 percent and 44 percent respectively.

The community of Salida, located at the north end of Highway 99, has seen the greatest amount of growth in residents commuting outside of the county to work. From 1990 to 2000, the percentage of commuters showed a noteworthy gain from 45 percent to 52 percent. The absolute increase in commuters over the ten year period totaled over 1,800 persons.

Residential growth in Stanislaus County is projected to remain primarily within the incorporated cities. The cities of Modesto, Ceres, Riverbank, and Hughson, are located within the Modesto urbanized area, and each is expected to have significant growth in housing by 2025. The City of Modesto will see a 150 percent increase in its housing stock by 2025, increasing from 64,959 to over 162,000 units. Ceres will see a 110 percent increase in the number of housing units by 2025 to over 21,900 from its current 10,435.

Turlock is also expected to experience moderate growth in housing development. From 2000 to 2025, Turlock will see a 91 percent increase in housing units. The other incorporated cities in Stanislaus County, including Newman, Oakdale, Patterson, and Waterford, will also see some residential growth over the projection period.

Job Growth

In the coming decades, Stanislaus County is projected to add over 136,700 jobs to its economy. By 2025, there will be over 323,000 jobs in the county, 73 percent more than currently exists. The City of Modesto is currently the job center in Stanislaus County. Over 44 percent of all jobs in the county are located in Modesto. By 2025, with 180,377 jobs, Modesto will employ over 55 percent of Stanislaus County's work-force. Census data indicates that

STANISLAUS COUNTY PROJECTIONS						
	2000	2005	2010	2015	2020	2025
Total Jobs	186,235	213,590	240,945	268,300	295,655	323,010
Population	446,997	522,822	598,647	674,473	750,298	826,123
Households	145,146	175,379	205,612	235,846	266,079	296,312
Jobs/Housing Ratio	1.28	1.22	1.17	1.14	1.11	1.09

Stanislaus County

over 70 percent of Modesto residents who are employed, work in Modesto. This number does not include those employed in several large concentrations of employment located in unincorporated Stanislaus County, within the Modesto and Ceres spheres of influence.

The second largest concentration of jobs in Stanislaus County is in the City of Turlock. Currently, Turlock has over 23,500 jobs, mostly goods and service producing jobs. Job growth by 2025 will be over 58 percent in Turlock with a projected 37,185 jobs in the city. The City of Turlock is the only other city in Stanislaus County (the other being Modesto) where over 50 percent of its employed residents work within the city.

Jobs/Housing Balance

In 2000, the jobs to housing ratio for Stanislaus County was 1.28. This figure indicates that, on average, Stanislaus county produces more housing units than jobs. Ideally, there should be 1.5 jobs for every household. A jobs/housing ratio under the ideal scenario suggests that there are fewer jobs than are typically needed for each household.

Based on the 1.5 jobs/housing ratio, in 2000, Stanislaus County produced almost 21,000 more housing units than needed to balance the available jobs in the County. By 2025, Stanislaus

County is projected to see its jobs/housing balance figure drop to 1.09, resulting in over 80,970 more housing units than jobs in the county.

HOUSING SURPLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000-2025 Percent Change
Ceres	894	5,758	544 %
Hughson	151	295	95 %
Modesto	10,901	41,798	283 %
Newman	398	1,484	273 %
Oakdale	973	4,738	387 %
Patterson	-17	1,108	-6,618 %
Riverbank	171	1,362	696 %
Turlock	2,728	10,311	278 %
Waterford	88	1,232	1,300 %
Remainder	4,702	12,297	162 %
Stanislaus County	20,989	80,383	283 %

Stanislaus County

Currently, the City of Patterson is the most “balanced” jurisdiction in Stanislaus County, with a jobs/housing ratio of 1.51. However, over the next 25 years, Patterson will begin to produce more housing than jobs which will reduce its jobs/housing ratio by 19 percent to 1.22. The

change in Patterson’s jobs/housing ratio will result in the city producing 1,108 more housing units than jobs over the next 25 years. Currently, Patterson has 17 more jobs than housing units.

The overproduction of housing over jobs is a pattern that will be reflected in all of Stanislaus County in the next 25 years. Each jurisdiction, aside from Hughson (which will remain relatively constant), will see a drop in their jobs/housing ratio. The Cities of Oakdale and Waterford will experience the greatest decline in their jobs/housing ratios from 2000 to 2025. The jobs/housing ratio for both Oakdale and Waterford will drop by 31 percent. Oakdale’s ratio will drop from 1.24 to .85. Waterford will see its current ratio of 1.43 decline to .99.

In terms of housing surpluses and shortfalls, each city in Stanislaus County, including the unincorporated area, is projected to produce more housing units than jobs over the next 25 years. The City of Modesto is projected to have the greatest housing surplus in Stanislaus County. Based on the jobs/housing ratio of 1.5, Modesto currently has a housing surplus of 10,901 units. By 2025, that figure will rise by 283 percent to over 41,790 units.

The unincorporated portion of Stanislaus County and the City of Turlock are also projected to produce many more housing units than jobs. In the unincorporated areas of the county, over 12,297 more housing units will be produced than jobs. This reflects a 162 percent increase over the unincorporated area’s current levels. The City of Turlock is projected to increase its housing surplus by 7,583 units over the next 25 years for a total housing surplus of 10,311 units.

JOBS/HOUSING BALANCE

	2000 Jobs/Housing Ratio	2025 Jobs/Housing Ratio	2000-2025 Percent Change
Ceres	1.37	1.11	-19 %
Hughson	1.31	1.32	0 %
Modesto	1.25	1.11	-11 %
Newman	1.21	.92	-24 %
Oakdale	1.24	.85	-31 %
Patterson	1.51	1.22	-19 %
Riverbank	1.44	1.10	-23 %
Turlock	1.28	1.06	-17 %
Waterford	1.43	.99	-31 %
Remainder	1.28	1.07	-17 %
Stanislaus County	1.28	1.09	-15 %

TOTAL POPULATION

	2000	2005	2010	2015	2020	2025
Ceres	34,609	40,607	46,605	52,604	58,602	64,600
Hughson	3,980	4,586	5,191	5,797	6,402	7,008
Modesto	188,856	239,035	289,214	339,392	389,571	439,750
Newman	7,093	7,931	8,769	9,607	10,445	11,283
Oakdale	11,503	14,775	18,047	21,320	24,592	27,864
Patterson	11,606	13,233	14,861	16,488	18,116	19,743
Riverbank	15,826	18,188	20,550	22,913	25,275	27,637
Turlock	55,810	64,137	72,465	80,792	89,120	97,447
Waterford	6,924	8,076	9,228	10,379	11,531	12,683
Remainder	110,790	112,254	113,717	115,181	116,644	118,108
Stanislaus County	446,997	522,822	598,647	674,473	750,298	826,123

TOTAL HOUSEHOLDS

	2000	2005	2010	2015	2020	2025
Ceres	10,435	12,731	15,026	17,322	19,617	21,913
Hughson	1,223	1,473	1,722	1,972	2,221	2,471
Modesto	64,959	84,377	103,795	123,213	142,631	162,049
Newman	2,079	2,431	2,783	3,134	3,486	3,838
Oakdale	5,610	6,681	7,752	8,823	9,894	10,965
Patterson	3,146	3,714	4,281	4,849	5,416	5,984
Riverbank	4,544	5,133	5,722	6,310	6,899	7,488
Turlock	18,408	21,747	25,085	28,424	31,762	35,101
Waterford	1,990	2,313	2,636	2,959	3,282	3,605
Remainder	32,752	34,781	36,810	38,840	40,869	42,898
Stanislaus County	145,146	175,379	205,612	235,846	266,079	296,312

TOTAL JOBS						
	2000	2005	2010	2015	2020	2025
Ceres	14,312	16,296	18,280	20,265	22,249	24,233
Hughson	1,608	1,939	2,270	2,602	2,933	3,264
Modesto	81,087	100,945	120,803	140,661	160,519	180,377
Newman	2,521	2,723	2,925	3,127	3,329	3,531
Oakdale	6,955	7,432	7,909	8,387	8,864	9,341
Patterson	4,744	5,258	5,772	6,286	6,800	7,314
Riverbank	6,560	6,909	7,258	7,607	7,956	8,305
Turlock	23,520	26,253	28,986	31,719	34,452	37,185
Waterford	2,853	2,994	3,135	3,277	3,418	3,559
Remainder	42,075	42,840	43,605	44,371	45,136	45,901
Stanislaus County	186,235	213,590	240,945	268,300	295,655	323,010



For more information:
www.abag.ca.gov/planning/interregional
Inter-Regional Partnership
c/o ABAG
P.O. Box 2050
Oakland, CA 94604

Printed on recycled paper by J.T. Litho, Oakland